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Spain

Avocado

Annual

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Report Highlights:

Spanish avocado production during marketing year 2001 (Jul '01-Jun '02) increased from previous years. Marketing year 2002 harvest area and production are forecast to increase further to about 8,000 hectares, and 68,000 metric tons. Immigration from South America and Africa is contributing to increased consumption of avocados in Spain.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Madrid [SP1], SP

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EXECUTIVE SUMMARY

The Spanish avocado campaign starts in early October with the Bacon and Zutano varieties. A month later, in November, the Strong variety follows, and from December to June. The Hass variety. Most of the avocado production 90 percent is concentrated in Andalusia, mainly in Malaga and Granada.

Industry estimates that Spanish avocado planted area has been virtually unchanged during the last three years. Area planted included old trees as well as new orchard. It takes from five to six years for a young tree to yield. Harvest area is forecast to have a slight increase to about 8,000 hectares (ha) from 7,800 ha in 2001.

Official data estimates avocado production at 65,300 metric tons (mt), a 17.5 percent increase from 55,500 mt in MY 2000. Production increases are due to favorable climatic conditions and new orchards started to yield.

FRESH AVOCADOS

PS & D Fresh Avocados

PSD Table						
Country	Spain					
Commodity	Fresh Avocados				(HECTARES)(1000 TREES)(1000 MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Area Planted	9,400	8,200	9,500	8,200	0	8,200
Area Harvested	8,600	7,500	8,700	7,800	0	8,000
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	47,000	55,500	60,000	65,300	0	68,000
Imports	4,500	3,690	5,000	4,690	0	4,000
TOTAL SUPPLY	51,500	59,190	65,000	69,990	0	72,000
Exports	39,400	42,190	45,000	48,550	0	50,000
Fresh Dom. Consumption	12,100	17,000	20,000	21,440	0	22,000
Processing Consumption	0	0	0	0	0	0
TOTAL DISTRIBUTION	51,500	59,190	65,000	69,990	0	72,000

PRODUCTION

Spanish avocado production during MY 2001 (Jul'01-Jun'02) increased from previous years. Official data estimates avocado production at 65,300 mt, a 17.5 percent increase from 55,500 mt in MY 2000. Production increases are due to favorable climatic conditions and new orchards started to yield. MY 2002 harvest area and production are forecast to increase to about 8,000 ha and 68,000 mt. According to industrial sources, most of the avocado production 90 percent is concentrated in Andalusia, mainly in Malaga and Granada with a regional area of about 7,000 ha. The Spanish avocado campaign starts in early October with the Bacon and Zutano varieties. A month later, in November, follows the Strong variety, and from December to June the Hass variety. The main avocado variety in Spain is Hass.

Industry estimates that Spanish avocado planted area virtually unchanged during the last three years. Area planted included old trees as well as new orchards. It takes from five to six years for a young tree to yield. MY 2002 harvested area is forecast to have a slight increase to about 8,000 ha from 7,800 ha in 2001 due to newer orchards beginning to bear.

Standard avocado orchards fit naturally under what the Spanish call "integrated production" regulations. This production is designed to obtain better quality products using the different elements from the "agrosystem" (water, plant, soil and weather) more effectively with the goal of reducing environmental impact and keeping production profitable. This process regulates the use of pesticides as avocado plantations require a certain amount of these inputs.

CONSUMPTION

Avocado consumption for MY 2001 was 21,440 mt, a 25.5 percent increase from 17,000 mt in MY 2000. This increase in consumption is a shift in consumer preference as well as an increase in Tex-Mex restaurants which have introduced more "ethnic" avocado dishes in Spain. MY 2003 consumption is forecast to continue increasing.

Also, according to Industry sources, a change in the demographic population, partially due to immigration from South America countries, is contributing to increase consumption of avocados as well as other exotic tropical fruits and vegetables in Spain.

TRADE

Spanish avocado exports were 45,345 mt in calendar year (CY) 2001 (Jan - Dec), a slight decrease from 46,204 in CY 2000. However, Spanish avocado exports during MY 2001 are estimated at 48,550 mt, about 15 percent increase from 42,190 mt in MY 2000. The main market for Spanish avocados continues to be the rest of the European Union (EU), particularly France that absorbs 56 percent of the total.

Product available for export in the future will depend on the rate of increase of domestic consumption as compared to the rate of increase of Spanish production.

Spain's primary competitors in the EU market are Israel and South Africa. Spain expects to continue being the main supplier to the EU.

As Spain is a major producer and exporter of avocados, imports are generally a fraction of exports. Spanish imports were 4,720 mt in CY 2001, a 30 percent increase from 3,639 mt in CY 2000. Spain imports most of the avocados from France (2,411 mt) and Peru (1,032 mt) mainly during July and October, when their product does not compete with the local crop.

Spanish avocado imports during MY 2001 are estimated at 4,690 mt, about a 25 percent increase from 3,690 mt in MY 2000. This increase in imports was because the MY 2002 production was delayed due to cooler weather and additional imports were necessary to address demand during this interim time period.

Spanish Exports Fresh Avocados, 2000-2001

Export Trade Matrix			
Country	Spain		
Commodity	Fresh Avocados		
Time period	C.Y	Units:	Metric Tons
Exports for:	2000		2001
U.S.		U.S.	
Others		Others	
France	27,283	France	25,596
United Kingdom	6,782	United Kingdom	6,957
Germany	3,008	Germany	2,984
Netherlands	1,777	Netherlands	2,192
Sweden	1,575	Sweden	2,081
Denmark	1,333	Denmark	1,218
Total for Others	41,758		41,028
Others not Listed	4,446		4,317
Grand Total	46,204		45,345

Spanish Imports Fresh Avocados, 2000-2001

Import Trade Matrix			
Country	Spain		
Commodity	Fresh Avocados		
Time period	C.Y.	Units:	Metric Tons
Imports for:	2000		2001
U.S.		U.S.	
Others		Others	
France	1,991	France	2,411
Peru	958	Peru	1,032
Mexico	195	Mexico	343
South Africa	212	South Africa	295
Portugal	117	Netherlands	154
		Portugal	134
Total for Others	3,473		4,369
Others not Listed	166		351
Grand Total	3,639		4,720